




Employer eServices Customer Reporting Creating a Group Segment Filter

Group Segment Filters allow you to define a portion of your business operations. Each saved expression is called a filter, and each filter can be used as the basis of a report.

Task	Step	Action
<p>Create a Group Segment Filter</p>		<p>Creating a group segment filter is the only way you can run a report using a segment of your customer population.</p> <p>Note: Customer Segment Number (CSN) = policy or group number</p>
	1	Click Tools from the Navigation menu to open the Reporting Tools screen
	2	Click the Create or Modify a Group Segment Filter link to open the Group Segment Filter Editor screen.
	3	First, create a name for the Group Segment by entering the name in the Name field. You can also enter a description , but this field is optional.
	4	Click Create to open the Group Segment Filter screen.
	5	Click the Customer Segment Number in the Elements field.
	6	Click the  to move the highlighted Elements to the Selected Elements field
7	Click Append to add the Customer Segment Number to the New Expression Group .	
		<p><i>You are now ready to Save the Filter for the entire population or add more filters.</i></p>

Task	Step	Action
Adding Another Attribute	1	Click the Add Attribute link from the Expression Group table.
	2	Click an Attribute radio button. Options: <ul style="list-style-type: none"> • Subgroup 1 = Suffix or Department Number • Subgroup 2 = Claim Account • Plan Variation • Report Code • Franchise Code 1 • Franchise Code 2 The Operators and Elements boxes refresh to display items associated with your attribute selection.
	3	Click an item from the Operator box. <ul style="list-style-type: none"> • Greater than (>) -- elements of a greater value than your selected element are included in your results. • Less than (<) -- elements of a lesser value than your selected element are included in your results. • Equals to (=) -- element you select is included in your results. • Not Equal to (<>) -- all but your selected element is included in your results. • Greater than or equal to (>=) -- the element you select and all other elements of greater value are included in your results. • Less than or equal to (<=) -- the element you select and all other elements of lesser value are included in your results. • Between – all elements within a range of two elements, including the start and end points, are included in your results. • In – all elements you select are included in your results. • Not In – all but your selected elements are included in your results. You can make multiple selections with Between, In, or Not In operators.
	4	Select an item from the Elements box.
	5	Click the  arrow to add elements to the Selected Elements box. Click the  arrow to remove items from the Selected Elements box.
	6	Click the Append button to update the expression in the Expression Group table at the bottom of the screen.
	7	Repeat steps 1 – 6 to add additional attributes.

Task	Step	Action
Adding a New Expression Group	1	Click the Add button to create another expression group for this filter.
	2	Follow steps 1 – 5 for selecting a customer segment filter.
	3	Follow steps 1-6 for adding additional attributes.
	(Optional)	
Saving a Customer Structure Filter	1	Click the Save button to save the filter. Note: If you fail to save a filter, it will not be available for use when you run a report.